THE DOCUSER MODULE

- DOCUSER is the library information section of DOCLINE.
- It also NLM's directory of libraries and institutions and NN/LM's directory of members.
- Over 8,100 records, 3,200 of them DOCLINE participants.

ACCESSING DOCUSER
- To enter the module, click on **DOCUSER.**
- There are two menu choices – **Update** and **Search/View.**
- **Update** allows you to update your own record, including your routing table.
- **Search/View** allows you to find out information on other institutions.
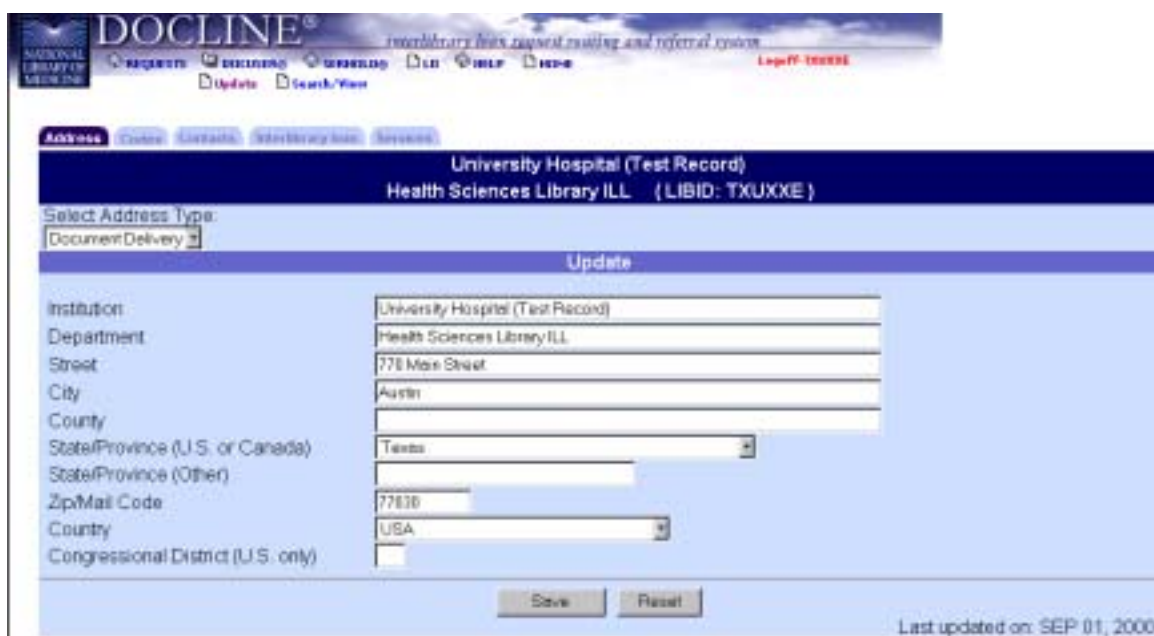

UPDATE
- Click on **Update.**
- There are five tabs in DOCUSER – **Address, Codes, Contacts, Interlibrary Loan,** and **Services.**

ADDRESS TAB
- The **Update** screen open to the **Address** tab.

- Almost all the tabs have dropdown boxes with further screens of information. For example, the **Address** tab has a dropdown box with a **Document Delivery** and **Institution Address type.**
- Each information screen must be updated separately. This means you must click on the **Save** button on each and every page. For example to update the address for your library you will need to:
  - ▷ Make the changes on the **Document Delivery Address** screen, and click on **Save**. Notice in the bottom right hand corner, this screen was **Last updated on SEP 01, 2000.**

  - ▷ Wait for the **Update complete** message.

  - ▷ Click on the **Address** tab. Notice the page now says **Last updated on JAN 30, 2002.**

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> ⟫ In the **Select Address Type** dropdown box, select **Institution.** Notice this screen was **Last updated on SEP 06, 2001.** The date was not changed on this screen because so far only the **Document Delivery** page has been updated and saved.
> ⟫ Change the address information on the **Institution Address** screen and click on **Save.**
> ⟫ Wait for the **Update complete** message.
> ⟫ If more updating needs to be done for your record, click on the appropriate tab.

CODES TAB

- The **Codes** screen is in two sections – **Display Only** and **Update.**
- The **Display Only** section may only be changed by the RML. You may review your **Region Code, Library Type, Library Level** and **Library Group(s)** for accuracy.
- Contact your RML with any corrections.

- The **Update** section can be completed by you.
- Use the **Comments** field on this page to include important library details. Example: Part-time library – only open Mon, Wed and Fri.
- Enter your **OCLC Symbol(s)** and/or **National Union Catalog ID,** if available.
- **Batch Update Authorization** refers to batch updating of SERHOLD. It is not yet available.

CONTACTS TAB

- The dropdown box under this tab has six contact screens – **Director, Interlibrary Loan, Loansome Doc, Network, Reference,** and **SERHOLD**.
- Each contact page requires the same information for each appropriate contact person – **Name, Title, Phone, Fax** and **Email.**
- The **URL for the Home Page** field refers to a page that deals with the function, i.e. Loansome Doc.
- Input the appropriate contact person in each screen even if in some cases the same person may be the contact person for more than one function.
- If your library is not a Loansome Doc participant, this screen can be left empty.
- Remember to click on **Save** on each contact page.

INTERLIBRARY LOAN TAB

- The information entered under this tab deals with your ILL policies.
- The data collected in the tab is used for the accurate routing of requests.

CHARGES

- The **Interlibrary Loan** tab opens to the **Charges** screen.
- Input your charging and loan policies as appropriate.
- The **Comments** on this page should only refer to the corresponding charge or loan policy

DELIVERY METHODS

- Click on the check boxes next the methods you are able to send and/or receive documents – **Fax, Ariel, Email,** and **Web.**
- The correct routing of requests depends on your selections.

DOCLINE

- This is a **Display Only** screen.

Select ILL Information Category:
DOCLINE

Display Only		
Checked items apply to this institution		
DOCLINE Participant	☑	
DOCLINE Active	☑	Last changed:
Routing map last changed by :	37937	Last changed: AUG 18. 2000

ILL SERVICES

- This screen has the information on your basic services.
- The check boxes next to **Borrow items via Interlibrary Loan** and **Lends items via Interlibrary Loan** should be checked.
- If you **participant in EFTS**, check the box next to Participates in Electronic Payments.
- If you are able to **fill Rush Request**, check that box.
- Do not check the box next to **Uses ISO/ILL Protocol**. The protocol is not yet available.

Select ILL Information Category:
ILL Services

Update			
Check all that apply to this institution			
Borrows items via Interlibrary Loan	☑	Lends items via Interlibrary Loan	☑
Participates in Electronic Payment	☐	Uses ISO/ILL Protocol	☐
Fills Rush Requests	☐		
ILL Home Page (URL)			
ILL comment			

LOANSOME DOC

- If you wish to be a Loansome Doc lender, you must check the box next to **Loansome Doc Participant**.
- Check the boxes next to those you will service and those you will charge.

Select ILL Information Category:
Loansome Doc

Update			
Check all that apply to this institution			
Loansome Doc Participant	☑		
Provides services to:		Charges for services to:	
Affiliated Health Professionals	☐	Affiliated Health Professionals	☐
Unaffiliated Health Professionals	☐	Unaffiliated Health Professionals	☐
International Libraries	☐	International Libraries	☐
Non (US) Citizens	☐	Non (US) Citizens	☐
Non Health Professionals	☐	Non Health Professionals	☐
URL for Loansome Doc Home Page			
Comments			

ROUTING PROFILE

- On this screen, input your default information for **Requests**.
- In **Requests**, your routing instructions automatically filled in from this screen.

- **Form** is the format in which you want the requested document sent – **Copy** or **Original**.

- **Copyright Compliance** is which copyright rule you are complying with in the individual request – **Guidelines** or **Laws**.
- **Guidelines** refers to the CONTU Guidelines
- **Laws** refer to the Copyright Laws.

- The **Maximum Cost** is the amount you are willing to pay.
- NOTE: N/A means you are willing to pay any charge. If you want only free documents, you must write in FREE, not N/A.
- If request is routed to a library that charges more than your Maximum Cost, they will stop the request for **Cost.**

- In the **Comments** field, include only those comments you use on almost every request.

- In the **Authorized By** field, the name of the person inputting the request can be added as a default.

- **Network Delivery** is the method you want the document sent to you.

- **NLM Delivery** is the method you want NLM to send you the documents.
- This also the place to select **Never route to NLM.**

- Enter your Ariel IP address in the **Ariel IP** field.

- **M/A/N Map** stands for Monograph/Audiovisual/Non-NLM Serial Map.
- M/A/N requests are only sent to the four selected libraries and then to NLM.
- M/A/N requests do not automatically route.
- In the boxes, you may enter the LIBIDs of the libraries you want M/A/N requests sent to.
- LIBIDs cannot be directly written into the boxes. You must use the **edi**t buttons.
- To add a LIBID, click on **edit** next the box.

- Accept the system message by clicking on **OK**.
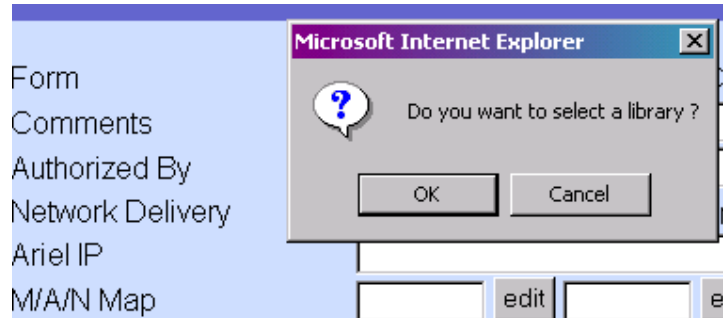
- A separate window called **Library Lookup** opens.
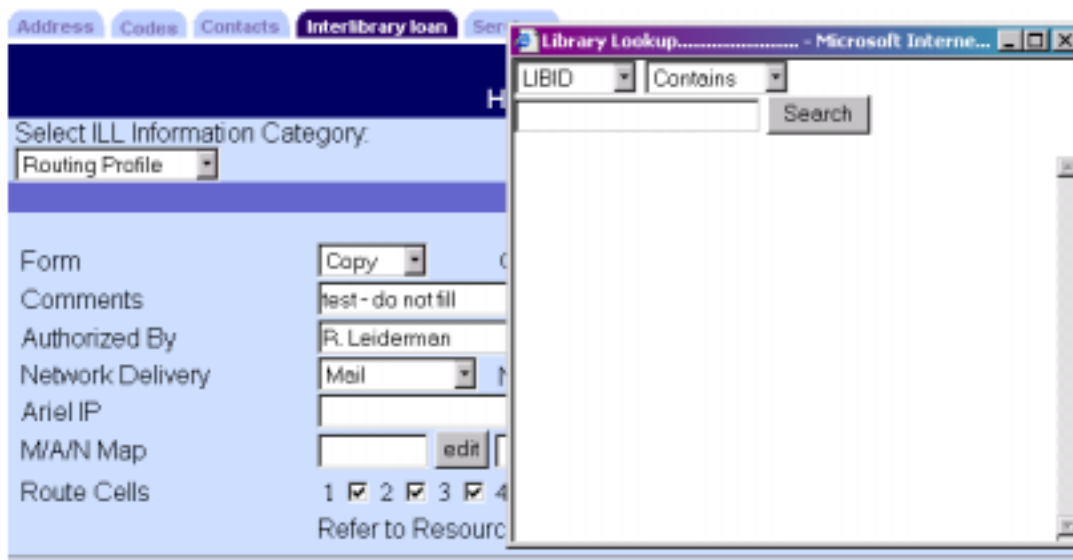
- You may search by the **LIBID** or the **Institution** name.
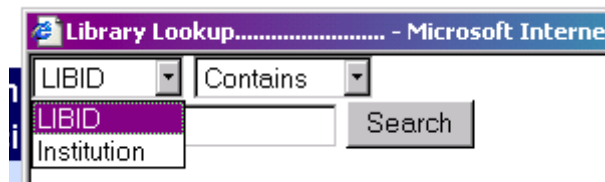
- Notice you can change the **Comparison Terms**.
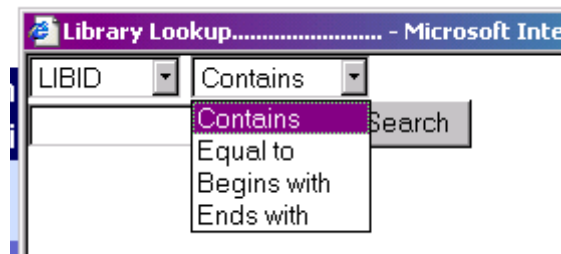
- Type the **LIBID** or **Institution** name and click on **Search**.
- Click on the **LIBID**.
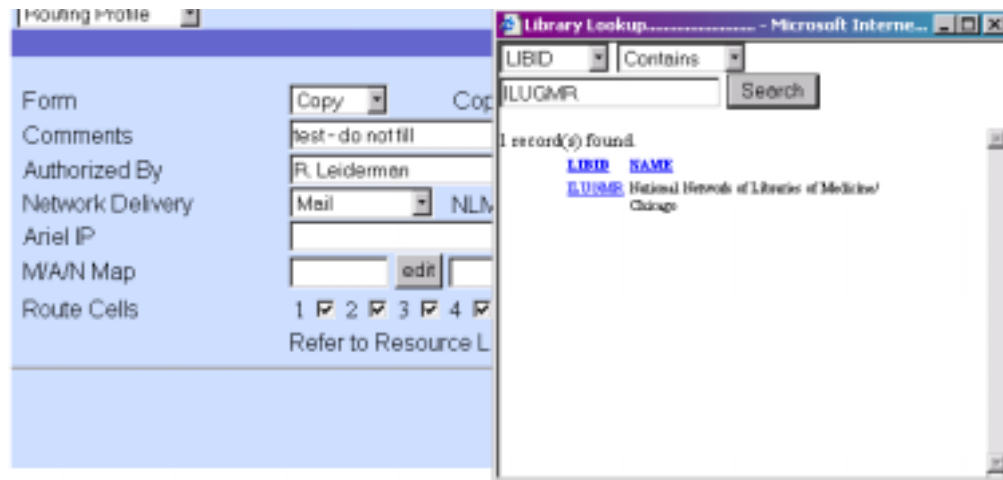
- Notice the LIBID is added into the **M/A/N Map**.
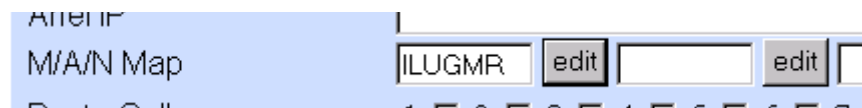
- To remove a LIBID from the **M/A/N Map**, click on the **edit** button.
- A system message asks if you wish to remove the LIBID. Click on **OK** to finish the removal.
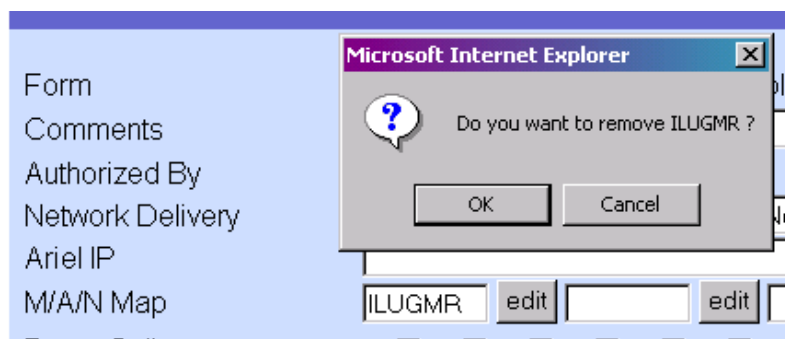
- **Route Cells** corresponding the **Routing Table** and can be default deselect.
- **Refer to Resource Libraries** allow you have requests referred to potentially all the Resource Libraries in the Network.
- **Refer on after NLM** allows you to have NLM search for potential lenders. NLM forwards your requests up to 20 libraries.

- The **Routing Table** is where you input the libraries you will borrow from.
- The table is made up of nine cells with space for 20 libraries in each cell, so you may have up to 180 libraries in your table.

- Usually the first step in updating your table is to look at the current table.
- You can view the entire table cell by cell by click on the radio buttons next to each cell.

- If you would rather print out the current table, click on the **Go** button by the dropdown box that says **production** under **Select Routing table for display**. Notice that the only choice in the dropdown box is **production** at this time.
- The **production** copy of your routing table opens in a separate window. Use the browser's print option under **File** to print the table.

ADDING LIBIDS
- The buttons to **Add, Remove** or **Move** libraries are at the bottom of the screen.

- To add a library, you must be in the cell you want to add the library in.
- Click on the **Add** button.
- A **Library Lookup** window opens.
- Search for the library by **LIBID** or **Institution** name and click on **Search**.
- Click on the **LIBID**.
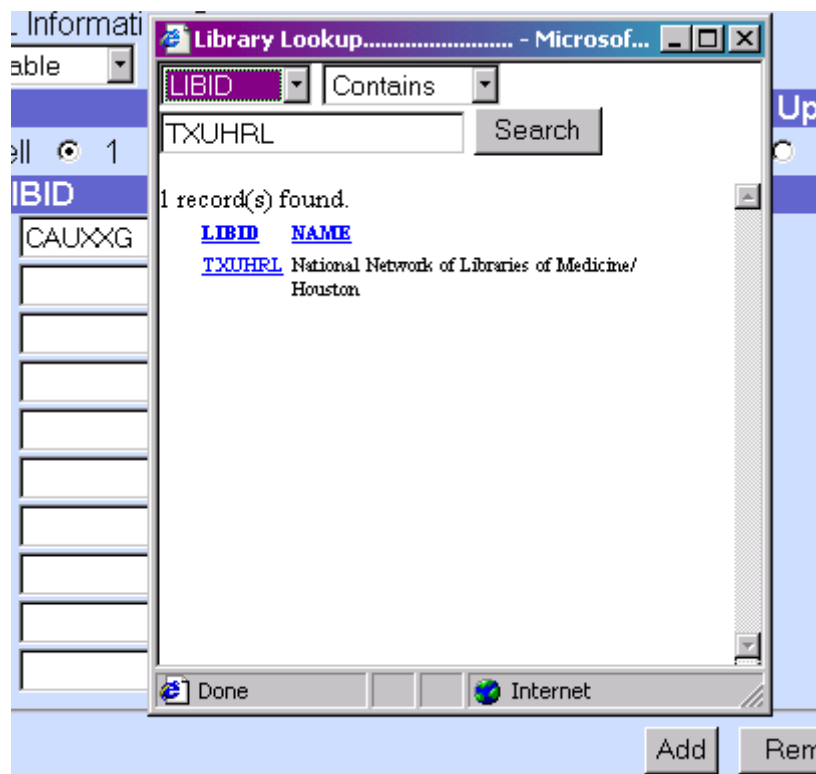
- The LIBID is added in the next available row. NOTE: The DOCLINE System will automatically place the LIBIDs in alphabetical order.
- A system message asks if you wish to **Choose another library?** By click **OK** you will be able to continue to search for more LIBIDs. If you are finished adding to this cell, click on **Cancel**.
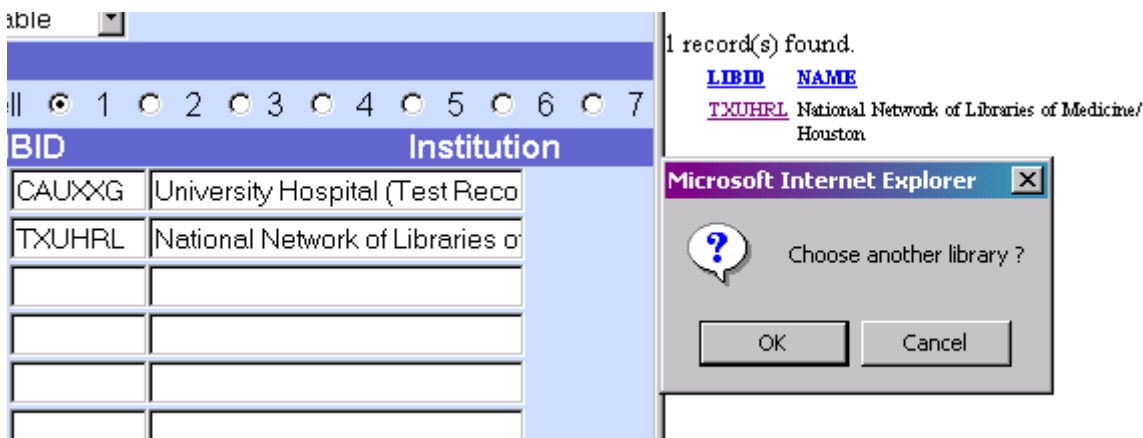
MOVING LIBIDs

- To move a LIBID from one to cell to another, you must be in the cell you want to move the LIBID from.
- Click on the **Move** button.
- A system messages asks for the row number you want to move. Type in the **row number** and click on **OK**.
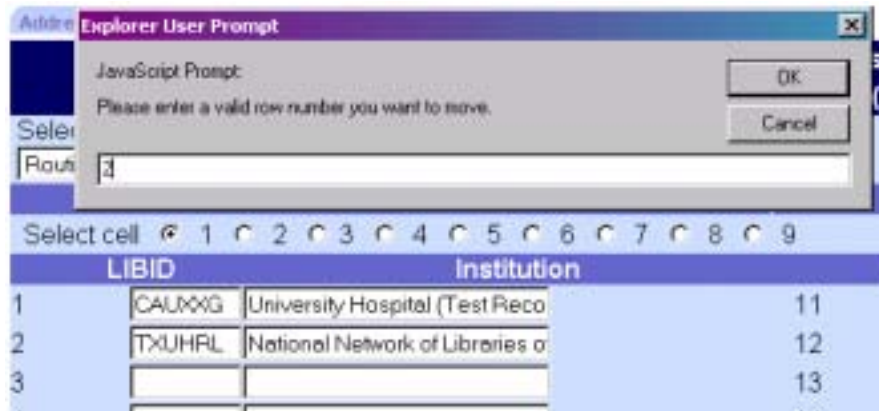
- Another system message asked which cell you want the LIBID to move to. Type in the **cell number** and click on **OK.**
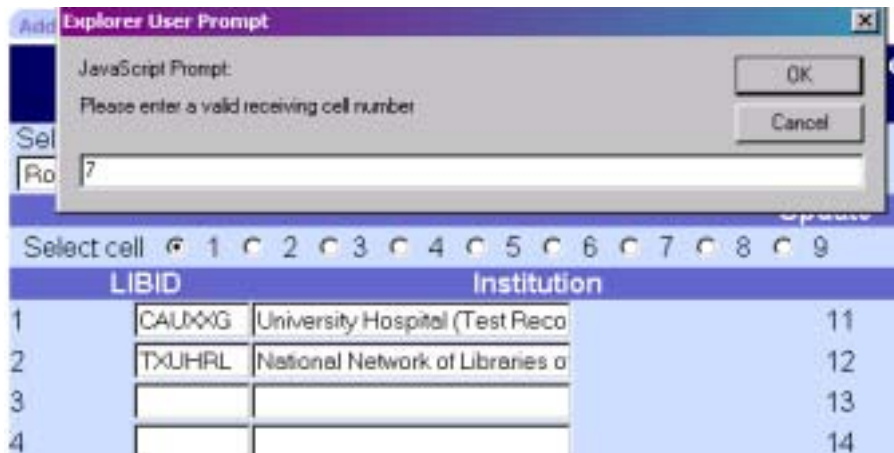
- Another system message asked if you are certain that you want to move the LIBID to the other cell. Click on **OK**.
- The LIBID disappears from the current cell and if you click on the other cell you'll see the moved LIBID is the last one listed.
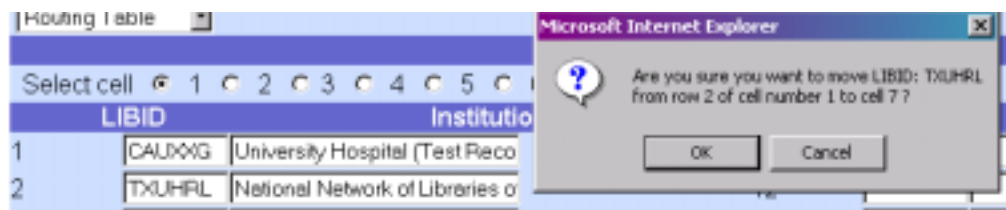
REMOVING LIBIDs

- To remove LIBIDs from your table, you must be in the cell you want to remove the LIBID from.
- Click on the **Remove** button.
- A system messages asks which row you wish removed. Type in the **row number** and click on **OK**.

- Another system message asks if you are certain that you want to remove the LIBID. Click on **OK**.

- NOTE: In the routing table, LIBIDs in upper case letters are active DOCLINE participants. LIBIDs in brackets in lower case letters are either closed or temporarily deactivated libraries.

- When you have finished all your updating, click on **Save all cells**.
- NOTE: The **Routing Table** is the only screen in the DOCUSER module where you can save after making all of your changes. You do not need to save after each add, remove or move, but can save after the entire table is updated.
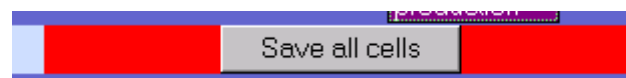
- A system message tells you that the updated Routing Table will not be active until it is approved by the RML. Click on **OK**.
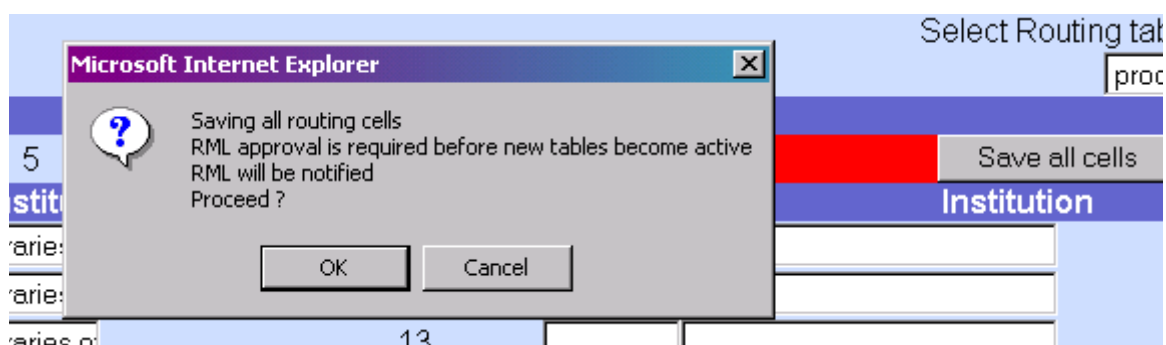
- Until the RML coordinator has approved your table, the following message will be remain on your **Welcome screen**.

Messages for TXUXXE
University Hospital (Test Record)

1 LOANSOME DOC requests awaiting LD RECEIPT
Routing table is awaiting approval
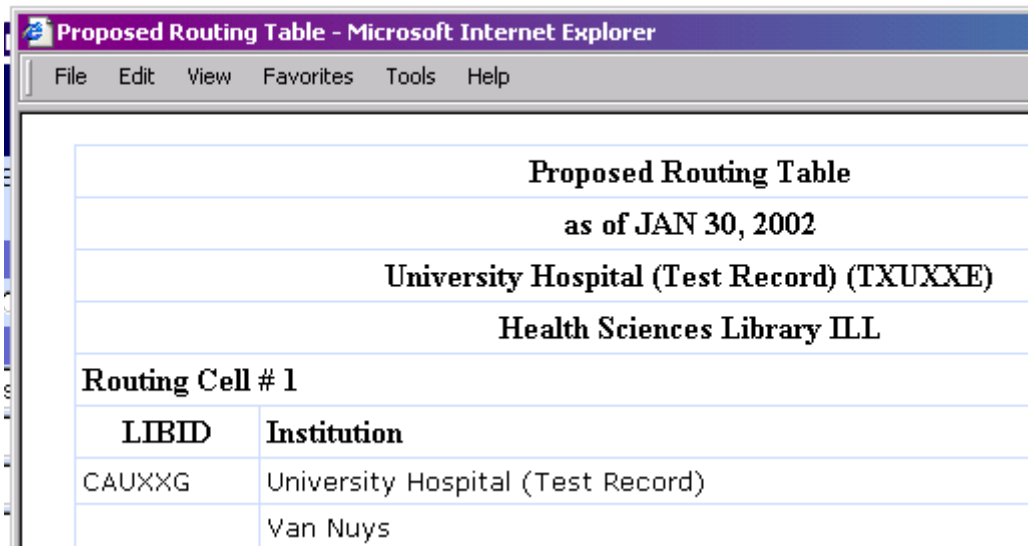
- Until the table is approved, your requests will route on the **production** table.
- If you click in the **Select Routing table for display** dropdown box, you will see that now there are three choices – **production, proposed,** and **compare**.

Select Routing table for display:

production ▾ GO

production
proposed
compare

Save all ce
Institution
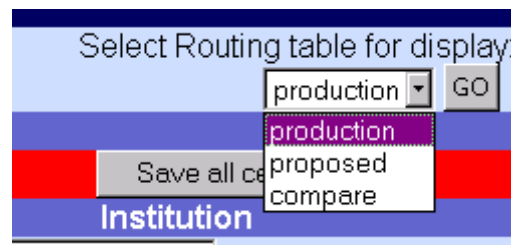
- The **production** table is the current table - the table before your updates were made.

Production Routing Table - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help

Production Routing Table
as of AUG 18, 2000
University Hospital (Test Record) (TXUXXE)
Health Sciences Library ILL
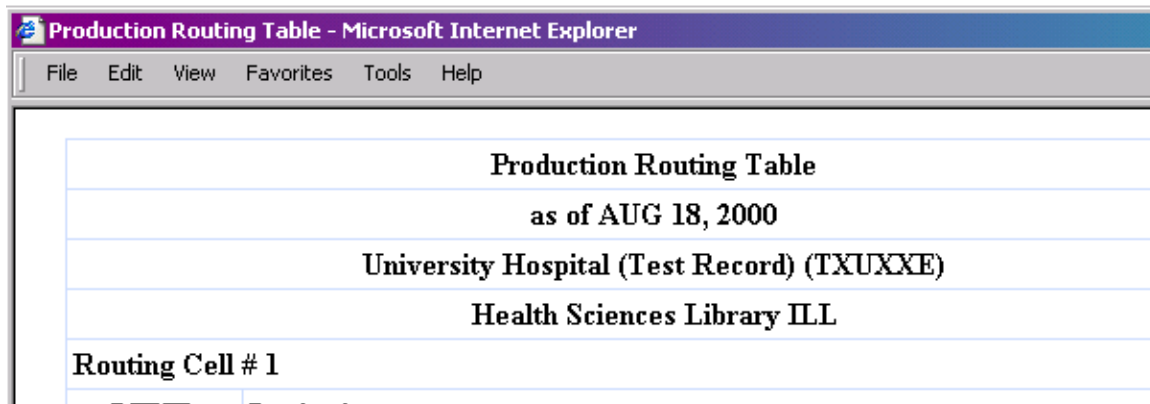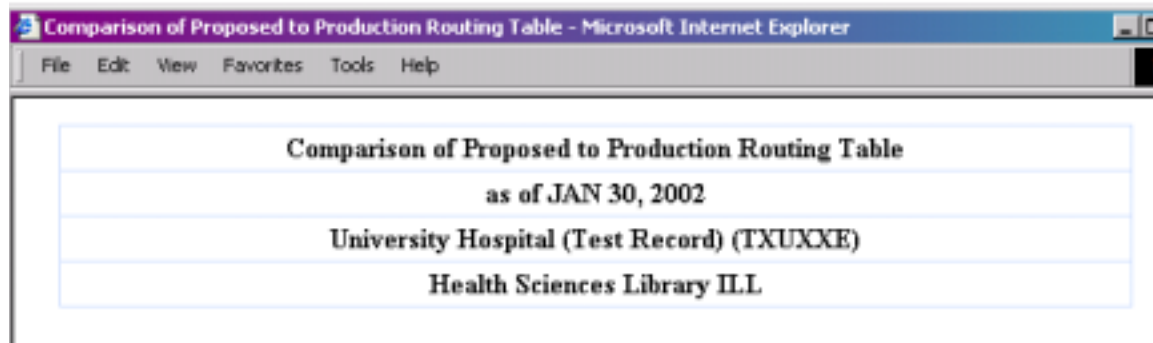
Routing Cell # 1

- The **proposed** table is the updated table awaiting approval.

- The **compare** table shows the difference between the **production** and **proposed** table - it shows what changes you made.

- To print these tables, use the browser's print option under **File**.
- Once the table has been approved, the dropdown box will go back to only having the **production** choice.

SERHOLD
- The **SERHOLD** Screen has two sections – **Display Only** and **Update**.
- The **Display Only** section shows when the SERHOLD holdings were last updated and by which User ID. It also shows how many titles are in your holdings and how many are Level 2 and 3.
- The **Update** section allows you to type in the date of the last time your holdings were reviewed.

SERVICES TAB
- This tab includes some detailed information about your library's services.

CONSUMER HEALTH
- The **Consumer Health** Screen asks about if you have a collection and web site.
- Potentially, MEDLINEplus can link to your web site if you include it on this page.

NETWORK MEMBERSHIP

- This is a **Display Only** screen that gives more information about your membership.

SERVICE PROFILE

- This screen asks for detailed information about your technological abilities and those you service.
- NOTE: If you do not wish to be included in any public directory, click in the check box next to that choice.

- Reminder: You must click on the **Save** button as you go from tab to tab, screen to screen.

SEARCH/VIEW

- The Search/View menu choice allows you to search for other libraries.
- One use of the **Search Screen** is to find out more information about libraries you want to add to your Routing Table.
- The **Search Screen** has three **Search in** boxes. The dropdown boxes contain the criteria you may search by.
- Next to the **Search in** dropdown boxes are the **Comparison Terms** boxes and then the **Boolean Terms** boxes.

- There 18 **Search In** criteria. Some of the most used ones are **LIBID, Institution, Region Code,** and **Library Group.**

- Some of the criteria open another window of choices. For example, **Region Code** opens another window with a list of the regions. Click on the region you want to select it.

- There are two **Only if** dropdown boxes. **Only if** selection help limit your search
- Some of the most used **Only if** limits include **DOCLINE Participant, DOCLINE Ariel Service and Network Members.**
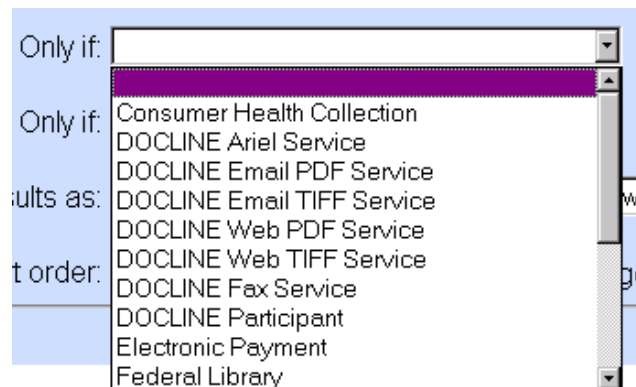
- **Display results as** offers ten display formats for your results.

- Next to **Display results as** is **In order to.**
- **In order to** is the way to receive the results – to view them, to print them or to download them.
- Whether the results are only viewable, or printable as well, depends on the display option.
- For example, **Institution list** only allows **View records**, but **ILL Address** allows **View or Print results** and **Download results in ASCII.**

- The order in which results are displayed depends on the display format selected.
- **Sort order** allows you to receive the results in a different order.

- The default **Records per page** is 25 and up to 500 records per page can be retrieved.
- There is also a **Record count** option.

DISPLAY FORMATS

- Linkable lists like the **Institution list** link to the libraries' DOCUSER records or the libraries' web sites.

- Click on any of the library's information to view their record. NOTE: Certain portions of another library's record are not available for viewing, i.e. their Routing Table.

- Information lists like **ILL Information** only show a printable document of certain information.

- The ASCII formats can be transferred to Excel or Word for further use.
- For example, **ILL Address** can be gathered for a mailing.